



# National Association of Estate Planners & Councils

1120 Chester Avenue - Suite 470, Cleveland, Ohio 44114

## National Association of Estate Planners & Councils Committee Volunteer Application

NAME \_\_\_\_\_

Primary Professional Discipline: \_\_\_Attorney \_\_\_Accountant (CPA) \_\_\_Financial Planner (CFP® / ChFC®)  
\_\_\_Life Insurance Professional (CLU®) \_\_\_Trust Officer

Designation(s) held \_\_\_AEP® \_\_\_EPLS \_\_\_CFP® \_\_\_ChFC® \_\_\_CLU® \_\_\_CPA \_\_\_JD \_\_\_CTFA

Please List Other Designation and/or Degrees \_\_\_\_\_

FIRM/COMPANY \_\_\_\_\_

ADDRESS \_\_\_\_\_

TELEPHONE (Business) \_\_\_\_\_ (Cellular) \_\_\_\_\_

Email \_\_\_\_\_

I am a member of the \_\_\_\_\_ Estate Planning Council.

I am current on all continuing education requirements required by all degrees/designations held \_\_\_Yes \_\_\_No

List Professional/Trade Organizations to Which You Now Belong in Addition to NAEPC:

### Committee Interest (check all that apply)

- Accredited Estate Planner® Designation (meets monthly on the 4<sup>th</sup> Monday at 2:00 pm ET)  
*Responsibilities: designation program maintenance & growth, must be a current designee*
- Annual Conference (meets monthly on the 4<sup>th</sup> Monday at 11:00 am ET)  
*Responsibilities: program development, fundraising for upcoming annual conference & general event policy*
- Council Relations (meets monthly on the 4<sup>th</sup> Thursday at 11:00 am ET for approximately 30 minutes)  
*Responsibilities: affiliated local council retention & growth within territory structure, promotion of benefits, programs & services for council consumption*
- Member Benefits (meets monthly on the 4<sup>th</sup> Monday at 4:00 pm ET for approximately 30 minutes)  
*Responsibilities: review and refer member benefit applications, online speaker's bureau review*
- Multi-Disciplinary Teaming (meets monthly on the 2<sup>nd</sup> Thursday at 2:00 pm ET)  
*Responsibilities: oversight of projects & materials related to the team concept of estate planning*
- Publications (meets quarterly, schedule for 2017 to be determined)  
*Responsibilities: oversight of the NAEPC Journal of Estate & Tax Planning*
- Robert G. Alexander Webinar Series (meets every other month on the 4<sup>th</sup> Thursday at 2:30 pm ET)  
*Responsibilities: programming and oversight for webinar series*
- Website & Technology (meets monthly on the 3<sup>rd</sup> Tuesday at 10:30 am ET)  
*Responsibilities: development of affiliated local website platform, [www.naepc.org](http://www.naepc.org), oversight of association's social media strategy, and varied committee requests*

*\*committee placement subject to availability and chair approval – meeting dates and times subject to change*